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ABSTRACT

This handbook describes what must be done to coordinate and manage distance education activities, shares practitioners' tips, provides guidelines for ensuring quality and strategies for building successful programs, and tells how to find specialized information. In addition to offering an introduction to the concepts and activities of distance education, the book is a guide to continuing one's professional development while employed in the field. The handbook's five chapters explore five central topics of distance education: (1) how the emerging field of distance education is defining and redefining itself; (2) how to distinguish the mission of distance education from that of other organizations; (3) how to identify and apply the most effective methods in distance education materials and instruction; (4) how to manage distance education activities, combining quality and financial self-sufficiency; and (5) how to develop and maintain one's professional knowledge of the field. An annotated list of 13 references as well as 32 reference notes are included in this guide. (KC)

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Distance Education: Staff Handbook

Harold Markowitz, Jr.

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Foreword

Drawing upon substantial experience, Dr. Markowitz has constructed an excellent road map for finding one's way through the central concerns of distance education. He not only describes what must be done to coordinate and manage distance education activities, but also shares practitioners' tips, provides guidelines for assuring quality and strategies for building successful programs, and tells how to find specialized information.

The handbook should be especially useful to individuals preparing themselves for new or expanded responsibilities in the field of distance education, as well as to institutions that would like to provide an orientation handbook to new staff members. In addition to offering a succinct introduction to the concepts and activities of distance education, the book is a guide to continuing one's professional development while employed in the field.

This book is one of several in the Guide Series addressing aspects of distance education. The series includes publications for students, for those preparing and teaching courses, and for distance education staff members. By focusing on central concerns and issues, the series is intended to serve people in businesses and proprietary institutions, as well as in colleges and universities. Each book in the series has been prepared to share experiences and to suggest proven methods for developing and sustaining effective programs.

Charles E. Kozoll
Editor
Guide Series

About the Author

In writing this book in the Guide Series, Harold Markowitz draws on his distance education experience at the University of Florida, at Indiana University, and at the Air Force's Extension Course Institute. He is the author of over 40 publications in the United States and abroad on continuing education and distance education, and has been a speaker at more than 15 professional conventions. Dr. Markowitz is the former Chairman of the Division of Independent Study of the National University Continuing Education Association and the National Home Study Council, and has visited numerous distance education programs throughout the nation. His doctorate is in curriculum and supervision from Teachers College, Columbia University.

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Introduction:
Making Distance Education Work

This handbook is intended for the people who make distance education work. It provides background information about the coordination and management of distance education programs, along with practical advice you can apply in your job. Think of it this way: this book will help you to become more effective and to polish your image. The place to start a winning program is by honing your knowledge and professional skills.

In this handbook we explore five central topics that affect every professional in the field:

- How the emerging field of distance education is defining and redefining itself (Chapter 1: What Is Distance Education?)
- How to tell where to place your distance education efforts and what to leave to others (Chapter 2: The Mission of Distance Education)
- How to identify and apply the most effective methods in distance education materials and instruction (Chapter 3: Effective Methods for Distance Education)
- How to manage distance education activities, combining quality and financial self-sufficiency (Chapter 4: Managing Distance Education Activities)
- How to develop and maintain your professional knowledge of the field (Chapter 5: Opportunities for Professional Development)

As a staff handbook, this publication goes beyond discussion: it prescribes, laying out the standards for working with others to achieve shared goals. It is designed to be the "good little book" in your staff activities. If you apply the standards and processes described here, modified as necessary to fit your environment, you will have a solid foundation for excellence.

Speak to other educators about distance education, and you will encounter a remarkable range of views. Some see it as peripheral, others as a vital component of lifelong learning. Some feel unprepared to deal with students who differ in age and motivation and location, and others see these differences as easily addressed. Faculty members who are unfamiliar with distance education can be surprised that its students rank with the best of their academic peers; those unfamiliar with this method of study may mistakenly assume that it somehow results in a leveling of achievement.

Experience produces other observations. With experience, the distance education (DE) teacher or administrator often sees educational effects that are as great at a distance as they could have been in any traditional classroom. To achieve excellence in any environment, the school must use all the tools that can reasonably be focused on the task—specialized knowledge, carefully prepared materials, appropriate media, feedback, and encouragement. An important difference in DE is this: efforts can be multiplied, touching more people than could be influenced in a lifetime in the classroom.

Dominating distance education is the conviction that it should not be left entirely to the student to learn and that it should not be left entirely to the classroom to house education. Our society is too complex, too technological, too industrial to retain intact the traditions of a simpler era.

Education has become a team effort, and the team has brought new tools to the job.

Chapter 1
What is Distance Education?

Chapter 1
What Is Distance Education?

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Opportunities for Professional Development

Distance education is an emerging field. Do you recall the fable of the blind men describing the elephant—a wall, a rope, a tree—each telling what little he knew of the whole? Emerging fields are like that, with many new practitioners and specialists each only dimly aware of the larger field. No wonder, then, that we end up with incompatible definitions of distance education. Specialists in remarkably diverse activities think of themselves as being at the very center of the field. For example:

The educational technologist: "Distance education is media-based instruction. The term emphasizes media's freedom from classroom limitations in location and time, as well as its ability to provide needed interaction and correction."

The director of independent study: "Distance education is education. The central difference between DE and conventional education is the absence of immediate contact with teachers and classmates."

The educational corporation president: "Distance education is an industrial response to the need to transfer knowledge. Remove the cottage industry aspects of preparing and presenting courses, and you have DE."

The term *distance education* is not very old. In existence for about twenty-five years, it entered into popular use in this country only in the last decade or so. Distance education is an international field, so the term has different shades of meaning from one country to another.

Originally, in the United States, *correspondence study* seemed too narrow a term to encompass the growing use of other media, implying only the exchange of written assignments between student and instructor. Audio tapes, television, radio, telephones, computers, and other media either were in use or planned for use, and *correspondence study* seemed an outmoded way to describe their application to nontraditional education. An attendant problem was that a series of public revelations about the shoddy practices of disreputable institutions had made the term *correspondence course* the butt of innumerable jokes.

America's proprietary correspondence institutions adopted the term *home study* when forming the National Home Study Council, a standard-setting and accrediting body for such schools—primarily vocational and military programs. U.S. universities mostly, though not entirely, cast off the title *correspondence* and adopted *independent study* somewhere in their

titles. Neither *home study* nor *independent study* implies incompatibility with the use of new media, but the terms were understood to mean correspondence programs. It was awkward for people associated with instruction on public television, for instance, to think of themselves as engaged in home study or independent study. A more inclusive term was needed.

Distance education, the term originally used in England and the Commonwealth, has now entered the vocabulary of educators worldwide. Many almost-synonyms have been used and then rejected overseas, in the United States, and in Canada. If one had to place a date on the general endorsement of the term *distance education*, it would be in 1982, when the International Council for Correspondence Education met at Vancouver and adopted the more media-conscious title International Council for Distance Education.

The use of media alone is not enough to qualify a program as distance education. For example, media used to supplement classroom teaching would not constitute distance education, even though the same programs used in another context might do so. Similarly, self-instruction is not a form of distance education because it does not involve interaction between the student and a teacher or an institution. A *system* is implied—with teaching, learning, and a planned mechanism for instructional feedback. Many authorities, though by no means all, accept the insights of the German educator Otto Peters. He argues that traditional forms of education are remnants of preindustrial times; classroom instruction is traditionally viewed as a craft, and its theoretical base is rooted in an assumption of direct interaction.[1] Distance education—with its focus on production of educational materials, its specialized roles and organizational structures more like a business than a school, and its ready application of technological developments—might be seen as an outgrowth of the industrial revolution. In this view, conventional education and distance education are distinct endeavors, each with its own theoretical underpinnings. Distance education is neither a substitute for nor a supplement to conventional education; it is an identifiable area within the field of education, and not simply a mode of instruction.

Australian educator Desmond Keegan, an international authority in the field, defines distance education as characterized by five elements:

- The separation of teacher and learner
- The planning and preparation of materials under the influence of an educational organization
- The use of technical media to unite teacher and learner
- The provision for two-way communication
- The absence of the learning group

Keegan hedges some of these characteristics by referring to the "quasi-permanent" separation of teacher and learner or the quasi-permanent absence of a learning group. After all, distance education may occasionally be interspersed with group or individual meetings with an instructor. Keegan also cites two "socio-cultural determinants" that are preconditions to distance education: (a) the relative abundance of industrialized features and (b) the comparative privacy of the learning environment.

Keegan's definition tells us that DE is not the whole of education and therefore cannot achieve the whole of education's tasks. By definition, *distance educators must produce materials that teach, and they must assure two-way communication that makes a difference.* Those are manageable tasks, in which an educator can develop some real expertise.

Why Do We Need Distance Education?

One way of looking at the need for distance education is to ask: What is the problem for which DE is the solution? The more traditional way is in thinking about education, the more apt way is to conclude that classroom interaction has produced very good results for several thousand years. On the reverse side of this coin, people most intensively involved with the new media cite studies showing that a well-defined educational objective can be achieved in less time by media use.

The pros and cons of DE can be seen as an analysis of the need. The characteristics of traditional and distance education are compared in Table 1.

How Does Distance Education Compare With Traditional Education?

The comparison in Table 1 tells a story, but not the entire story.

We all recognize that classroom learning can at best involve a personal relationship between teacher and student—an experience that can change the life of a student forever. It is also reasonable to recognize that few students are privileged to have such an experience, possibly because few classroom teachers are capable of imparting it.

Every comparison assumes the best possible learning situation—competent teachers, motivated students, well-conceived courses. No method of instruction can be made teacher-proof, nor can it impart learning to someone who does not wish to learn. To be effective, any method of instruction takes a lot of effort on everyone's part.

Fundamental to distance education is that the student will seldom or never have personal contact with the instructor. This is of deepest significance; it can become a crippling deficiency unless compensated by a special

Table 1. Comparison of Traditional and Distance Education

	Traditional classrooms	Distance education
Time to learn	Set by the academic calendar or teacher availability.	Flexible. Compressed or expanded to fit individual needs and deadlines.
Location and pacing	Regular meetings at a fixed location. Equipment when needed. Library for research. Structure and classroom atmosphere meet student expectations.	Variable times and locations, often at work or at home. Fits into irregular schedules. Few limits on class size. Often self-paced. Some programs offer library support.
Cost	Extensive administrative and other fixed costs, requiring state and federal support. Out-of-pocket costs include travel, time away from home and work.	Often wholly or mostly self-supporting; strong pressures to hold down costs. Competitive costs a concern. Low "opportunity costs" with fewer job conflicts.
Learning outcomes	Real advantages when individual tutoring is needed; necessary when course objectives require interaction, discussion, or extensive fixed resources (as library, lab facilities). Identification with teacher. Information as current as the teacher's knowledge. Learn from other students.	Achieves cognitive goals, but not necessarily affective or motor skill goals, as well or better than the classroom. More extensive field experience is an option. All courses are carefully planned; field testing not unusual. Opportunity to present up-to-date information, but materials age "on the shelf." Self motivation a factor.

concern in providing feedback and in preparing course materials. Of all aspects of a distance education course, individual feedback and the quality of materials make the strongest impression on the student.

A distance education course should be made as alive and meaningful as any course in residence. In truth, this is not always the case. The teamwork that goes into DE would seemingly contribute to this goal, but stunning brilliance is rarely the outcome of committee work. Boredom sets in with extended exposure to any medium. Delays in feedback or the inability to

address each student also can sap the life out of a course, and DE is highly susceptible to these hazards.

You can offset such problems—and you can assure that the outcomes of the best DE are comparable to those of the best classrooms—by giving the student as many opportunities as possible to participate actively. Stimulating presentation is only a part of the answer; questions to be answered, problems to be resolved, field activities, opportunities for study in depth, and individualization also contribute. Most important of all, the student should be helped to identify with the course goals and should see each step as a contribution to achieving those goals.

Profile: A Diversified Distance Education Program

The image of a distance education program is often one-dimensional—TV courses, print-based correspondence courses, teleconference seminars, *or* computer learning networks. By examining a specific program, we see that image is not at all descriptive of successful DE programs.

In Clark Hall, on the campus of the University of Missouri (UM) in Columbia, the Center for Independent Study and Video Credit Courses is among the nation's most innovative distance education institutions. There are 14 professional staff members in the center and a clerical staff of 20; the faculty are employed in other departments and teach the center's 318 regularly offered courses on an overload basis. Like many university-based programs, the center must generate its own funds for staffing, course preparation, and instruction.

With more than 18,000 enrollments each year, the center has grown from a program of traditional correspondence courses to one that is noted for its diversity of educational media. For more than fifteen years its innovative Computer Assisted Lesson Service (CALS) has published carefully crafted study materials and produced extensive computer feedback on students' mailed-in scan sheets. A later development has placed CALS on-line, with dozens of high schools using modem-equipped terminals to transmit students' multiple-choice answer sheets and to receive instant evaluation from the Missouri Center. CALS courses have also been used aboard Navy ships and on military posts in the United States and overseas.

In 1988 the now-dominant CALS program lessons combined with independent study written assignments to require the grading of 130,000 lessons and exams at the center. Another activity of the center is its Video Credit Course Program, which distributes television courses throughout the state and also supplies audio cassettes and video cassette course

materials as a "home use" option. The video program draws on the resources of the UM campuses in Columbia, Kansas City, Rolla, and St. Louis. A network of learning centers throughout the state carries the video courses, in addition to cable and broadcast television stations.

Support for these efforts is combined with centralized student services, course production services, technical support, marketing, bookstore, and administration.

Chapter 2
The Mission of Distance Education

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■ ***How do you determine what is—and what isn't—DE's job?***

The American railroads collapsed, we are told, partly because management assumed it was in the business of running railroads. It should have asked, "What business are we in?" And the answer should have been, "The transportation business." Viewing transportation not as it was but as it would be, management might have saved the railroads by looking to the economic and technological future. There is a message here for distance education.

Professionals throughout the field of distance education often identify with a particular mode of operation or a single technology. There is a danger in failing to ask ourselves what business we are in and in being too easily satisfied with yesterday's (or today's) answer.

It is not always easy to pursue the organization's mission. The major problem is reluctance to try the unfamiliar. The DE manager knows that new and costly opportunities can be hard to embrace, though the availability of familiar tasks and probable profits should not determine the directions followed. A second hazard to the mission is that efforts are sometimes diverted by the hope of future rewards for "political" support, although such favors are rarely returned. A third common hazard is accepting gifts before examining them—the surplus computers that are yours for the cost of maintenance, the video equipment that only requires scheduling to become profitable, the grant-funded independent study course that will bring diversity if not enrollments to your program. Gifts can have a way of absorbing your capacity for mission support without moving you closer to mission accomplishment.

Follow this rule: Establish a mission and some goals that will achieve it, and bear down relentlessly on accomplishing them. Be open to new methods and new tasks, if they make sense in the context of your mission and goals.

It is worthwhile to examine the question, "What business are we in?" Define your task on paper whenever you conclude you are spreading yourself and your organization too thin. You cannot do everything and do it well. Examining what you are doing can help you build on your strengths. A good definition of task can be the first step in pruning away those diversionary efforts that have sprung up in reaction to opportunity or in response to requests. The second step is to refocus your efforts, immediately if you can or gradually if you must.

What Is Your Institution's Mission?

Surely every college and university in the nation professes that its mission involves teaching, research, and service. Responsibilities for carrying out this mission are unequally divided, of course, and the campus cyclotron gets more than its share of the research load. Institutions vary in whether they value teaching or research the most, but service is almost always seen as the least significant of the three areas.

Distance education, particularly when no college credit is given, is almost always viewed as a service activity. In the mission statement, "teaching" usually refers to resident teaching. You can do little about that, even if you disagree with it. Fortunately, some continuing education administrators have been able to influence policies governing promotion and tenure committees in having the efforts of DE faculty members recognized.

There is a mission statement for your institution—the accreditation team required it—and in some cases the administration and faculty have stressed it as the framework for a coherent pattern of activities. It is clearly in your interest to locate that mission and analyze it in light of current and planned activities. Starting with the mission, some universities and colleges have developed strategic plans, which will tell you where your institution's values lie. Look for clues about the real significance of a detailed mission or strategic plan: Who prepared it? What evidence is there that the administration pays any attention to it?

Military programs of distance education are much more clear-cut in their assigned missions, but equally Byzantine in describing where the real values of the service lie. After considering your job and organization, structure your future efforts around the real values.

Although obligations to the owners or stockholders also enter into the equation, DE in proprietary institutions and corporate DE programs are similar to those of universities. The mission statement or similar document is the key to understanding the values that DE is expected to serve. The statement, carefully crafted by the CEO, should be studied more carefully than the public relations brochure.

Profile: Comparing Military and Civilian Programs[2]

In military education programs, one sometimes hears that all those courses would form a strong basis for a civilian distance education program. They are very professionally prepared and in the public domain. The occupationally oriented subject matter often touches on jobs that civilians have, and there are also courses that broadly treat

management and topics drawn from higher education. To start a civilian DE program using military materials, one would only have to put on new covers and start advertising.

Would that work? A part of the answer can be seen in the distinct origins of military and civilian programs. In the nineteenth century, on-base educational programs grew up with the goals of teaching morality and literacy, which were judged to be pressing needs of the Army at that time. As the military's needs became more complex, its educational programs grew to encompass hundreds of specialized fields. With the coming of the all-volunteer force, quality education was seen as a needed incentive for retaining good people, as well as a means of assuring needed vocational and technical competence.

Civilian programs grew in a different way. The roots of distance education can be traced to the personal improvement Chautauqua Movement of a century ago. America's vision was that social and economic progress for the individual could be achieved through learning. The concept of a learning society emerged not to fulfill the school's role of transmitting understanding and culture to the next generation, but to enrich the quality of the learners' lives and to assure the personal benefits of occupational knowledge.

Thus military and civilian DE programs are not interchangeable because the goal at the heart of the endeavor is different. Military programs exist to satisfy the "external" goal of mission accomplishment. Civilian programs exist to fulfill an "internal" need of the individual. Differences in scale reinforce these values: military programs must automate to train massive groups, while civilian programs often focus on interpersonal communication and individualization even when using technology. In military programs, educational technology must be applied to accomplish the mission, whereas in civilian institutions, the choice of media is still debated, because the student may not always be best served by the technology of mass education.

Civilian and military distance education programs can learn from one another, but they can never be duplicates of one another. Each fulfills a distinct role in American education, and at the root they must serve different ends.

What Is Distance Education's Status In Your Institution?

When traditional education is at the core of the institution, distance education is typically at the periphery. In any competition for scarce resources such as program funding and staffing, the activity that is perceived to be

central will be first in line for those resources. Thus instruction in obscure languages or other courses in little demand are generally accorded a higher priority than is a distance education program on the typical campus.

The best way to overcome this difficulty is to blend with the central mission of the institution by offering new ways to achieve the most valued ends; removing the distinction between programs is the strongest measure for assuring support. Usually these differences go well beyond the simple need to have cooperative relationships. For example, if student head count is a factor in determining departmental funding and staffing, then ideally a way should be found to assign or share DE enrollments with the academic department.

Distance education is at the heart of some institutions. Good examples are Athabasca University in Canada, Edison College in New Jersey, the New York Institute of Technology, the Cleveland Institute of Electronics, and International Correspondence Schools. All offer recognized degree and certificate programs in which distance education is central. In institutions where the distinction between DE and traditional education may be blurred, there is less likelihood of harmful competition between programs.

But even in the most innovative of DE programs, there is always this: the measures by which distance education is evaluated are its effectiveness and cost in comparison with traditional programs. The effective DE program must compare favorably with traditional programs, with the specific advantages cited, or the advantage will be presumed to lie in the traditional classroom. In this context, an awareness of the literature of distance education and familiarity with its published research are invaluable. A program of in-house research is also apt to pay considerable dividends.

Many believe that this relationship between DE and conventional education may change. In *The Third Wave*, Toffler predicted that the "electronic cottage" would permit virtually unlimited extensions of communication, with lifelong learning and distance education entwined. However, educational institutions have been slow to embrace some forms of instructional technology, and other forms are much less suitable for instruction than their advocates first imagined.

What Does Your Organization Do Well?

The central activity of continuing education is service—service to individuals, to organizations, or to the community or region. The activity is needed, and there is certainly nothing wrong with making a profit while doing so. But making a profit is not the primary business of continuing educators. That can be a useful guideline if you notice a great deal of activity and little sense of forward movement, and you begin to look for the standards by which forward movement is measured.

Focused activity is more effective than random activity. To focus most effectively, you must determine who your clients are, determine the changes that they think will occur through your (institution's) efforts, and apply the resources necessary to get the job done.

It is possible to invest your organizational resources in countless ways, not one of which is wholly and permanently the right choice. Correctness of choice can be situational, drawing validity from elements in a changing environment.

These are the central factors that go into choosing what you will do with your distance education program:

- ***The economic situation***: What are you funded to do? If each of the elements in your program is judged on its economic contribution, are the benefits worth the cost?
- ***The staff situation***: What are the capabilities of your staff? Are long-term programs assured of appropriate staffing, or do they depend on the skills of a few rare or temporary individuals?
- ***The social situation***: What are you expected to do? Is your client group composed of a low-income group for whom skill building or social mobility is the goal, a middle-class group of educated individuals seeking continuing professional education, a retired group looking for stimulation and interaction? The answer can change over time.
- ***The technical resources*** available: What tools do you have, and what others can you realistically expect to get? In a sense, distance education has blossomed as a result of the inflexibility of traditional education. It would be ironic if a distance education institution itself became mired in its focus on a single medium. The use of a medium should be planned, rather than occurring by default, and we should make the most of the educational characteristics of each available medium.

What Are the National Trends?

Over the years, far more trends have been observed in distance education than have actually existed. It is an understandable phenomenon: we project that a ripple will become a tidal wave or that a possibility is a probability in disguise. Few are seriously injured by an inaccurate projection of the educational future, and so we continue to project without a glance backward at the methods used to produce so many distorted forecasts.

Amazing accuracy would result if one simply forecast tomorrow's weather to be the same as today's. Let us label that the conservative method of forecasting. Applying that approach to independent study, for example,

would suggest that courses in the future will be primarily print-based and that concerns about program costs will continue to limit the use of diversified media. A conservative approach also would suggest that most media use in independent study—primarily video and audio tapes, instructional computer programs, and interaction between students and their teachers by phone or computer—will remain at best supplements to courses rooted in textbooks.

Here are two examples from the literature of distance education that use a conservative method of forecasting:

> Independent study offices will undoubtedly make greater use of new high-tech delivery systems as the costs decrease to approach those of traditional correspondence study. But even then, print-based and mail-delivered correspondence study will persist. It looks as if the long anticipated demise of traditional correspondence courses is neither imminent nor inevitable.[3]

> Few changes will occur in the line-up of major independent study institutions in the next twenty years, though some medium-sized institutions may blossom and some larger ones may decline. Any major new program is most apt to be introduced at a larger public institution with an already well-developed continuing education activity. . . .[4]

The advantage of a conservative forecast, then, is that it is quite likely to be accurate, particularly in the near future. The disadvantage is that it is apt to underestimate the effect of elements of change in our environment.

At the other extreme, radical change is projected by assuming that the potential of an innovation will be widely recognized and fully utilized. There is always a note of idealism in such forecasts—what man can dream, man can achieve—and often the forecasters draw on specialized knowledge and experience to make their predictions. Thus an element of proselytizing frequently may be found in projections of radical change. In this view, the hindrances to implementation are never as powerful as the forces arguing for change. Let us call this the visionary view, for lack of a better term.

Examples of the visionary view abound. An early view of technology's impact on American education was a prediction by one of the nation's most respected technological leaders who said that "books will soon be obsolete in the public schools. Scholars will be instructed through the eye. It is possible to teach every branch of human knowledge with the motion picture. Our school system will be completely changed inside of ten years."[5] That was Thomas A. Edison, speaking in 1913.

It is instructive to see what the visionary view has predicted for the present. *The Chronicle of Higher Education* reported in 1976 on the National Science Foundation's investment of more than $14 million in the development of the PLATO and TICCIT computerized education systems and quoted the vice president of Control Data Corporation as predicting that PLATO would be in general use at all levels of education in six to eight years.[6] The basis for his prediction for 1982 to 1984 was that costs of computer-based education were decreasing: a single PLATO computer could provide individualized instruction to as many as 500 students at once, maintaining two-way communication with each of them.

A more recent article in *Distance Education* by a prominent spokesman in the field predicted the complete integration of technology into distance learning before the year 2000:

> The media mix of the near future is going to provide educators with the power to achieve two great... ambitions: at the same time to provide highly individualized, indeed largely learner controlled and learner directed programs... and to do it for the large mass of the population. The aspiration which technology now makes possible is individually supported, lifelong education for all who want it. . . . An infinitely complex profile of each learner will be built up; this will contain not only a record of every learning project, formal and informal undertaken in the lifetime, but data on learning style, cognitive style and abilities, attitudes, aspirations and motivations.... He/she can ask for a book, a journal article, a film, an audio tape from almost any source on any subject and have it delivered by cable, satellite, fiber-optic and personal computer almost instantaneously.[7]

The advantage of a visionary view is that it questions the methods of the past, even those that have met with success, and suggests improved methods while projecting their ultimate effect. A common criticism is that such forecasts are often overly focused on a single component of our future, accepting the tide of technological change without examining the economic or political or human elements that also constitute a distance education system.

Long-range forecasts are useful in the strategic planning that your organization does. You may apply the list of trends below as a middle-ground forecast, being neither too darkly conservative nor too rosy a visionary approach. To this list, add your own forecast of the future of the media you use or the client groups you serve.

These are the five international trends that will most strongly influence the future of distance education:

1. Distance education is certain to find increasing application. Population growth, social and economic demands for options in higher education, and increased requirements for professional and occupational certification will fuel this expansion.

2. Technology will offer more opportunities to supplement traditional media. As distance educators and classroom teachers increasingly adopt identical media supplements, differences between DE and traditional courses will become less distinct.

3. Students will continue to be active in media use, relying less upon schools and teachers to present new information. Increasingly, students will enjoy both public and personal access to media (such as educational TV, educational audio and video tapes, video disks, and instructional computer programs) that once would have been controlled by schools. The traditional dominance of the school as knowledge-broker already has begun to erode.

4. The cost of education in all formats will continue to grow. Competing options in education will have to demonstrate a competitive return on investment as well as comparative educational effectiveness. Accountability will thus become more central in decision making in both DE and traditional education.

5. Professional staffing and professional management of distance education will increase in numbers and in the depth of background knowledge. Applied research and specialized academic preparation will become more commonplace. The literature of the field will proliferate, and knowledge and application of it will grow.

A final caution: Detecting and reporting the trends in your professional environment can be either a managerial tool or a political act. As a managerial tool, reports should separate advocacy from any analysis of trends. Without this separation, there is a danger of fooling yourself and misleading your boss and colleagues. As a political act, a slanted report of trends can be enjoyably self-serving and a Machiavellian source of support for an endangered program. An analysis created for a political purpose should be tucked away and forgotten at the earliest convenient moment, lest it be confused with planning data.

Profile: Institutions and Enrollments[8]

Within the NUCEA, the Division of Independent Study consists of 77 institutions, which have joined together to encourage the exchange of ideas between professionals in the field of distance education, particularly in courses and programs by correspondence, radio and television,

and newer electronic technologies. In 1990 the division reported 329,301 enrollments for the previous fiscal year—a 5 percent annual growth rate.

Slightly more than half of all enrollments were in college credit courses, which have traditionally been emphasized by NUCEA institutions. Although the 185,992 college enrollments represented continued growth, the trend has been for this enrollment segment to diminish as a percentage of the whole because of the increasing popularity of noncredit and high school programs.

Towering over all other independent study programs in the nation in their college credit enrollments are Indiana University (IU) and Brigham Young University (BYU), each enrolling more than 10,000 annually. IU is noted for the quality of its courses, having won numerous awards for curriculum excellence. Both IU and BYU offer remarkably diversified programs, including high school and noncredit as well as college courses; BYU lists nearly 500 courses continuously open to enrollment. A measure of the intensity of curriculum development is the number of editors employed there: IU has eight, BYU has four. Indiana does not use computer grading, and only 1 percent of the assignments at Brigham Young are graded by computer, even though savings in time and money would presumably make this an attractive option.

High school courses attract one-third of the independent study students nationally, with 103,381 enrollments in 1989. Half of the NUCEA independent study institutions offer high school programs, but three institutions dominate: Texas Tech and the universities of Missouri and Nebraska each enroll more than 10,000. Missouri is most noted for its Computer Assisted Lesson Service (CALS) system, and 80 percent of their high school assignment grading is done by computer. Texas Tech has built its enrollments by focusing on the needs of students and schools in the state. Major high school programs in the proprietary sector, such as the American School in Chicago, are not members of NUCEA and thus are not surveyed by it.

The smallest segment of independent study is in the noncredit area, with 12 percent of all enrollments. Noncredit courses tend to be vocationally oriented; for example, Penn State University's series of courses on automatic sprinkler systems and the University of Florida's dietary manager course. Enrollments in both of these programs have amounted to thousands of students over the years, though the enrollment in typical noncredit programs tends to be quite small. Nationally, Penn State dominates the field of noncredit programs, with more than 16,000 enrollments per year. Other major programs are at California State University at Sacramento, Purdue University, the University of Florida, and the University of Wisconsin.

> Noncredit programs vary in their enrollments from year to year, much more than college or high school programs; often they are based on meeting less enduring demands. Like the high school programs, many noncredit programs are not surveyed by NUCEA. These include programs of most institutions accredited by the National Home Study Council, which incorporates both proprietary and military training programs.

What Does Educational Theory Tell Us?

The term *educational theory* sounds a bit more abstract, a little more esoteric, than many practitioners would prefer. The term conjures images of tweedy academics and ivory towers in splendid isolation. It does not appeal to many individuals who think of themselves as shakers and movers. But it should.

Theory is the basis when you predict an outcome, interpret an event, or explain a position—and often when you apply what you believe in. Theory does not have to be derived entirely from abstract principles. It can be based on factual observations, which some refer to as grounded theory. The advantage of consulting educational theory, which is usually grounded theory, as a guide to distance education activities is that it will lead to logically consistent behavior with more predictable results. And it has the added advantage of suggesting good alternatives.

Several books provide useful discussions of distance education theory. Keegan's *The Foundations of Distance Education*[9] provides an excellent source of general information. Less easily obtained because of overseas publication, but well worth recommending for library purchase or reference, are Holmberg's *Status and Trends of Distance Education*[10] and Bääth's *Correspondence Education in the Light of a Number of Contemporary Teaching Models.*[11]

Robert Gagné's theories have been acknowledged both in the United States and internationally as being readily applied to distance education. A professor at Florida State University, Gagné has published books on learning and on teaching that are popular as texts and as references. His *Conditions of Learning*[12] presents a model of learning that is not unlike a flow-diagram for a complex project, with emphasis on the internal and external processes that determine both short-term and long-term memory. By managing these conditions, the educator can improve the rate and retention of learning. His theory is highly compatible with instructional technology, and its extended treatment of teaching for understanding ("verbal, intellectual, and cognitive objectives") can be applied to DE.

An award-winning Ph.D. dissertation done at the University of Kansas in 1988 illustrates the use of theory. The author used Gagné's concepts to develop guidelines for improving learning from TV and for integrating TV with other DE materials.[13]

Michael Moore, who heads the American Center for the Study of Distance Education at Pennsylvania State University, has been a leader in recent efforts to create a theory of distance education, distinct from the field of education in general. His writing reflects his familiarity with the technology of distance education. Although neither Moore nor anyone else has formulated a comprehensive theory of the still-emerging field of distance education, his work has focused on the ways in which distance and learner autonomy interact. Programs vary greatly in the structure they impose on the student, and this is a significant dimension in learning, he concludes. Moore's research suggests that it may be possible to identify the characteristics of learners and then to prescribe the types of programs (that is, level of autonomy) they would find most effective. A good summary of his theory is contained in *Distance Education: International Perspectives*.[14]

Chapter 3
Effective Methods for Distance Education

Chapter 1
What Is Distance Education?

Chapter 2
The Mission of Distance Education

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Chapter 5
Opportunities for Professional Development

■ *What is the DE equivalent of excellence in the classroom?*

Classroom learning is the standard against which all other learning is measured. A useful approach to designing effective distance education would be to examine the elements in classroom teaching that influence learning, then carefully design and monitor those elements in the DE environment.

Gagné tells us that the "instructional events" in teaching involve:

- Motivating the learner to learn
- Communicating specific instructional objectives
- Focusing the student's attention
- Helping the student recall prerequisite knowledge
- Guiding learning (as in aiding generalization, for example)
- Enhancing retention (as conducting reviews, giving examples)
- Promoting learner transfer (by applying to new situations)
- Demonstrating learning (by assessing student achievement)
- Providing feedback to the student (on attaining objectives)

Effective classrooms contain these elements, and effective learning packages or study guides must do so also if they are to substitute for classroom experience. The saying that "teaching isn't telling" stresses the good teacher's focus on student learning, not subject matter alone. It is a fundamental error to assume that the process of learning is different in DE. A video presentation does not teach because of demanding production values alone, nor does an independent study course equal the classroom experience merely because it involves reading the same textbook.

The DE equivalent of classroom excellence is not the learning materials the program produces, but the values expressed in those materials.

What Methods Are Best in Course Development?

Practical suggestions for course development are presented in another publication in the University of Illinois's Guide Series, *Preparing an Effective Self-Study Course*.[15] In that guide, the authors stress three areas:

- ***Planning the course***: From the start, each course must be planned with nontraditional students in mind. Their experience and motivation to enroll can be strikingly different from that of customary students. Effective alternatives to classroom interaction should be built in to reinforce learning and fuel motivation.
- ***Writing the course***: In self-study courses, the study guide is a primary instructional resource. Learning is managed through a series of carefully planned tasks for students. The essential steps in preparing a study guide include stating objectives clearly, selecting appropriate resources (including texts), providing commentary that will develop the subject and focus study, and structuring assignments to achieve objectives.
- ***Supporting the student***: Providing individualized support, including a degree of personal concern for the student's progress in the course, can pay dividends not only in assuring learning, but also in encouraging course completion.

These are observations commonly made by administrators and faculty members experienced in the most common mode of American distance education, where one academic carries most of the weight of course planning, production, and execution. At best in this mode, a cooperative colleague or a supportive staff member might help refine materials growing out of the production phase.

As course development projects become more complex, we routinely add more quality controls, use more sources of information about students and subject matter, and assure that more professional skills are brought to the task. The concerns are not essentially different, but planning and execution go far beyond what any one person can do.

Thus, in major curriculum projects, external standards are more carefully addressed, needs analyses and field testing are more apt to be conducted, and course teams are more likely to be used. In DE, course development necessarily involves choices of media, which in turn involves some assumptions worth examining. Sections to follow will briefly explore these issues.

When are Needs Analyses Worthwhile?

Needs analyses are part of many major educational activities. Few proposals are funded without having some form of needs analysis, and traditional administrative wisdom supports the idea of gathering as much decision data as possible before committing your resources.

There is no standard method or content. Environmental scanning, including the systematic review of both general and professional publications, would qualify as a form of needs analysis. In the more traditional approach,

however, the researcher designs a questionnaire or a structured series of questions to ask in interviews. Clients are then identified and asked what they perceive their needs to be.

Profile: Practical Outcomes of Needs Analysis

At Indiana University, a needs analysis used a survey of clients of the high school independent study program. In all, 535 students and their counselors responded to two versions of a questionnaire that measured interest in proposed courses and explored motivation for enrolling. Optical scanning compiled most results, though the forms also contained an option for write-in responses.

The following results were incorporated in program practices:

1. Many of the courses most valued by their clients were not even in Indiana's curriculum. Course production plans were modified.
2. Marketing had been narrowly focused on those who needed additional credit to graduate. These marketing efforts were retained, but new efforts addressed other major motives for enrollment as well.
3. "Service courses," which were justified as part of a well-rounded curriculum despite few enrollments, were under review. The survey showed that counselors valued such courses highly, and they were retained.
4. Marketing had often stressed the new or the unusual courses offered. The analysis showed a massive lack of awareness of some long-established courses. Marketing focus was readjusted.

Surveys of needs can provide helpful data, although worthless surveys are commonplace. To avoid a major effort that confirms the obvious or raises more questions than it answers, follow these broad guidelines:

- ***Keep the project in perspective.*** A needs analysis should contribute to better decision making and wiser investment of your resources. The result is a factor in making better decisions, but it is not worthwhile to spend disproportionate amounts of time and money on this single factor.
- ***Focus the effort.*** Define exactly what you want to find out, and direct your efforts to getting that information alone. Extraneous questions can waste your time, diminish survey returns, and cause uncertainty about how to use the data that have been collected and sorted.
- ***Survey the right people.*** Do not conduct extensive surveys of past course graduates if you define your clients as their employers.

- ***Plan your analysis of data before conducting your survey.*** Laying out data worksheets will help ensure that you ask the right questions. If you particularly value the responses of decision makers or experienced users of your program, be sure to include items that will help you distinguish these people from casual respondents.

Needs analysis is a useful tool for making better decisions. Many unsuccessful distance education activities might have been avoided with a good needs analysis. If the decisions are already made and the resources are already committed, however, there is little value in gathering more data.

When is it Appropriate to Use Course Teams?

If distance education is an industrial response to what has by tradition been a cottage industry, surely the course team is the symbol of that response. Virtually every distance education program of any consequence has used the team approach in some manner. Large, media-based course projects would be years in the making without teams.

Course teams vary in complexity, from one author and one editor working closely, to a team of a dozen or more people focused on the production of a single course. In a sophisticated DE institution, roles may change to the point that the faculty member may be only one of several "subject-matter specialists" engaged for a specific project, whereas the permanent staff may consist of media specialists, artists, editors, and others who work on many course projects.

The concept of a course team is strongly associated with the British Open University. Sir Walter Perry, who established that institution twenty years ago and served as its first vice-chancellor, described the original process of building course teams in *The Open University*.[10] Perry brought three separate groups of specialists together: academic staff, radio and TV production staff, and educational technologists. The teams originally consisted of nine to sixteen persons, but later grew larger. As he described the process:

> All three groups had then to learn about each other's problems and to work together on a common task. We had to operate by teamwork and this was the whole basis of the concept of the "course team." I believe this was one of the most important and far-reaching concepts of the Open University which, it seems probable, will become more and more widely used all over the world. (p. 77)

Very few of the most highly valued contributions to our society can be attributed to committee work. Certainly the most brilliantly conceived and brilliantly taught courses are not the product of course teams. But if there is

a certain leveling of achievement as more people are involved in the development of a concept, the worst misconceptions and the most boring instruction will probably not make it through the team process. Further, the course team seems to be the best concept for assuring that a plan calling for the integration of complex activities and specialized skills will operate on time and within budget.

Not everyone shares this conclusion fully. In the case of the SUN project, an extensive distance education experiment that failed, Van Kekerix concluded:

> The implications of the technology of any proposed organization should be carefully analyzed to determine whether it incorporates a challenge to the traditional technology of the sponsoring organization. In the case of the SUN project, the leadership did not deal adequately with the fact that the systems approach to course design/development/production incorporated a fundamental challenge to the traditional authority of the faculty in higher education. Whereas the faculty were traditionally the sole authority in determining what was taught and how it was taught, the systems approach relegated the faculty member to being only one voice among many in a course development team.[17]

It would be fair to conclude that the use of course teams is essential in a large and complex distance education activity, but that teams must be formed in the context of the institution they serve. In addition to assuring the appropriate mix of academic and technical skills and observing time and budget limitations, we must also consider politics and institutional values. One team cannot play all games equally well.

Will Print-Based Courses Survive?

Print-based courses have a history of success. One writer traced the beginning of print-based independent study to the letters of the Apostle Paul, and another writer to medieval Jewish scholars whose written opinions were carried to remote communities by messengers. A nineteenth century correspondence course offered in Germany is said to have been the origin of today's distance education. In America, distance education may be traced to "reading circle" materials sent to New England housewives in the 1800s. General Foulet, an aviation pioneer, claimed he learned to fly the biplanes of the Army Signal Corps by following instructions the Wright brothers sent to him, thus becoming the first to learn to fly by correspondence course, as he said.

Learning is demonstrated by a change in behavior, according to behavioral psychology. It is surprising that many people have doubts about print-

based courses, considering the diversity of behavior changes that have grown out of the materials people have read.

Print-based courses not only have a well-documented history of effectively changing behavior, they also are cheaper and more flexible than other courses. Von Pittman, director of the Center for [Nontraditional] Credit Programs at the University of Iowa, comments:

> There will always be students who wish to be unhampered by fixed schedules or fixed sites. And, to this point, no electronic medium has made mass audience delivery both extensive, in terms of course offerings, and cost-efficient.[18]

Print-based courses are sure to survive. In fact, texts and study guides will continue to be effective, flexible, and inexpensive elements in courses that are not print-based.

Will Media-Based Courses Dominate in the Future?

ERIC Clearinghouses[19] monitor the current literature of education. When the ERIC Clearinghouse on Information Resources at Syracuse University recently produced a report entitled *Delivery Systems for Distance Education*,[20] it reported on an impressive variety of technological applications. Print was not mentioned, however, since in the view of the author:

> Traditionally, correspondence has been the primary delivery medium; however, the delivery systems most common today are based on video, audio, and computer technologies.... Adaptations make live transmission of lectures, demonstrations, and audiovisual resource materials possible, often in an interactive context. (p. 1)

The publication goes on to list fourteen technologies now used in distance education. Grouped in related categories, these are:

- ***Video delivery***, which is cited as "the most attractive, complex, and expensive delivery system; its use requires a strong commitment on the part of educational administrators and public television personnel." The technologies: video conferencing with two-way audio or video transmission via satellite or phone lines; low-power TV (LPTV) covering a radius of about 5 miles; closed-circuit TV hard-wired on a campus; instructional fixed TV service (IFTS) covering a radius of 25 miles with one- or two-way audio and video; and cable TV (CATV) for community distribution. Although not cited in the ERIC list, video tapes and video disks are also very much a part of distance education today.

- ***Audiographic delivery***, which involves sending audio and still images over phone lines. The technologies: electronic blackboards that transmit voice and writing on a special screen; FAX (facsimile machines) either alone or in conjunction with microcomputers; slow scan video, which sends a frozen image each minute or so; and compressed video, transmitting video over phone lines, with a characteristic jerky motion.
- ***Audio telephone delivery***, which may be either a direct phone call or a conference call.
- ***Computer delivery***, including electronic mail, in which messages are left in an electronic mail box; bulletin board services, a message-posting service; and one-way teletext or two-way videotext transmission from computer to television screen.

That is an impressive list of all the ways to communicate without using ordinary speech, books, or papers. But even though a medium has the potential for communicating educational information, not many people can successfully use it for that purpose. The documented instances of effective educational use of some media is scarce, to understate the issue. The strength of the new media is that they can supplement and reinforce traditional media when properly chosen, rather than carry the burden of all instruction.

Managers of distance education make a mistake when they stick with one medium no matter what the need, forcing all content into that single container. If you are doing that now, perhaps you do not know how to use other media as effectively. The best cure is to identify an appropriate medium you are not using and take an experimental plunge. By using it once, you will develop needed knowledge and values for future applications.

In general, you may expect these results from any use of electronic media:

- You will find that it costs more than traditional education, until it reaches a relatively large number of students. Some clearly identifiable value should be served by offering an innovative program, a value that is not already being served by less costly means. If there is such value, then determine whether it will be worth the additional money to the one who pays the bill.
- You will find that someone needs to take charge. Conflicts must be resolved—those between production standards and academic content are common—and resources must be allocated. One person will need authority to make program decisions, even in a democratic group.
- You will find that some students will prefer electronic media, no matter what you do. This should never be mistaken, after the fact, as

the justification for a program. If you want unvarnished facts, develop an evaluation plan stated in terms of program objectives at the start of every new program.

There are certain to be more media-based DE courses in the future of American education than in the past, simply because more media are available. The most successful applications will reinforce the educational effects of print and other media without exceeding acceptable costs.

Profile: A Media Experiment That Failed

An experiment in open learning called the State University of Nebraska (the SUN project) began in 1971, with the goal of increasing access to higher education through the use of educational technology. Later, SUN expanded as it organized a regional open learning consortium—the University of Mid-America (UMA). The first students were enrolled in 1974. Journal articles and well-attended sessions at professional meetings featured progress reports and visionary forecasts for the experiment. But by 1979 SUN had ceased to exist, and by the end of 1982 UMA also had closed its doors.

What happened? The most comprehensive analysis is the 1986 Ph.D. dissertation by M. J. Van Kekerix.[21] The comments that follow are drawn from his study, which focused on the SUN experiment.

The SUN program began with strong resources. Carnegie Commission reports and a prominent Task Force on Reform in Higher Education focused national attention on the need for greater access to higher education and suggested innovative uses of technology. Federal emphasis had been placed on educational access. Feasibility studies pointed to SUN's success. The president of the University of Nebraska was an enthusiastic backer of the project. SUN had access to Nebraska's statewide educational TV network, arguably the most advanced in the nation.

There were inherent problems, however. SUN was a separate entity, not administratively responsible to the individual campuses of the university. A completely new structure had to be established and staffed. The new structure did not involve the faculty in any substantial way in curriculum decision making. Studies made before the project began raised questions that were later to prove significant, but at the time were obscured by the optimism of SUN leadership. Examples: The expectation that video coverage of a large geographic area implied a large client group; the lack of political support for the project among Nebraska's universities and community colleges, and in its legislature; the unrealistic assumption that the program could be operated without state subsidy; and the university faculty's concern over accreditation.

Operational problems developed. One- or two- or four-year curricula were planned, then abandoned to avoid direct competition with traditional programs. Decisions about which courses to produce were often determined by availability of funding rather than need; SUN and UMA courses had no curricular focus and did not lead to an external degree. The academic quality of TV course components was challenged, though by the standards of the TV producers the courses were good. Although twenty learning centers were envisioned as key components in the learning system, only four opened. To compensate, the central office assumed a greater role, but in doing so it obscured the role of the learning centers. Efforts to attract greater numbers of students failed. What political support there was, eroded.

The legislature, viewing SUN as a separate entity rather than as a vital part of Nebraska's higher education system, cut off funding in 1979. The University of Nebraska continued to offer UMA courses as telecourses; this program was not disrupted when UMA closed in 1982.

The SUN experiment overstressed availability as the central factor in attracting nontraditional students. It did not appropriately weigh whether students would choose to invest their time and money in learning and whether they had prerequisite learning skills. The original concept of offering an external degree was not followed, reducing the program to little more than a service to the students of other institutions. The costs of delivering instruction via telecommunications were underestimated. The SUN experience underscored the need for organizational leaders to understand political processes and to honor traditional roles and relationships even in a nontraditional environment.

How Do You Monitor the Quality of Instruction and Support?

There are three keys to quality in any program:

- Measure your efforts against generally accepted standards.
- Incorporate meaningful quality controls and quality reviews in your routine activities.
- Make changes that will affect future activities when you see that you should have done better.

If you practice these steps, both instruction and instructional support will soon rise to meet the standards you have set.

At first, the term *generally accepted standards* might seem nebulous. Where do you find the standards of distance education? The standards that follow were derived from the literature of distance education.

The NUCEA's *Standards of Good Practice in Continuing Education*[22] touches on the activities of nearly everyone in distance education. Addressing program quality, this publication is a compilation of nine documents from the Council on Postsecondary Education, the American Council on Education, the Southern Association of Colleges and Schools, and the Council on the Continuing Education Unit. Here are highlights of some major areas of concern:

- ***Off-campus programs***: Is the program representative of the quality of the sponsoring institution? Is there evidence of administrative and academic control and quality assurance? Is there assurance that the institution has not lent its accreditation to unaccredited contractors?
- ***Inter-regional university programs***: If programs operate in several accrediting regions, has each site met the regional accrediting standards of the home institution?
- ***Program advertising***: Are all statements clear, factually accurate, and current? Do catalogs clearly reflect total costs, refund policies, and the qualifications of faculty? Does the program misrepresent resulting job opportunities? Does accredited status clearly refer to the institution and not to individual courses?
- ***Use of telecommunications***: Has state authorization been obtained or have other consumer protection legislation requirements been met? Are objectives clearly defined and does the program have the resources to accomplish them? Are instructional outcomes measured? Is there a program of quality control to assure that accreditation standards are met?
- ***Military base programs***: Are off-campus and on-campus programs comparable? Are the credentials of the administrator and the faculty similar to comparable positions on-campus? Are facilities and academic support services (including library resources) consistent with program goals? Is there a provision for professional development of the faculty? Have unique needs of military students been considered in program planning?
- ***Making credit versus noncredit decisions***: Are all credit courses approved by responsible faculty and academic administration? Do all credit courses apply toward completion of degree or certificate requirements? Do course development procedures assure academically sound noncredit courses?

Principles of Good Practice in Continuing Education[23] is a report of the Council on the Continuing Education Unit. It consists of 18 general

principles and 69 derived elements of good practice—obviously more than can be restated here. The main points are described below in five broad areas:

- ***Learning needs***: Is there a systematic, objective procedure for assessing learner needs? Is a continuing education activity justified?
- ***Learning outcomes***: Are there clear statements of intended learning outcomes? Can they be assessed? Does each activity in a program contribute to achieving these outcomes?
- ***Learning experiences***: Does the program promote active participation? Is there a provision for giving feedback on performance? Do experiences reinforce one another? Is program content relevant and current? Is the instructional staff's experience and education adequate to assure quality? Are the physical facilities appropriate?
- ***Assessment***: Does assessment tell whether the desired learning outcomes were achieved? Are learners provided a means to evaluate the program? Is feedback used to plan future programs?
- ***Administration***: Is there a clear mission statement in writing? Are the human, fiscal, and physical resources sufficient to provide quality programs over an extended period? Does advertising provide full and accurate disclosure about programs, services, and fees? Are permanent student records maintained? Are quality control systems in use?

If you plan to offer CEU's, a primary source is *The Continuing Education Unit: Criteria and Guidelines*.[34] Standards derived from this work include the following:

- Are specific educational objectives established?
- Is there direct supervision by the organization that will award the CEU's?
- Is the number of CEU's awarded based only on instructional hours and related activities (and never on welcoming speeches or luncheons)?
- Are CEU's limited to those who satisfactorily complete the program?
- Are permanent, cumulative records maintained for each participant?
- Is there an appropriate evaluation in terms of the objectives? Does it cover both the program and the participants?

For an independent study format, the standard reference is the *Standards of the Division of Independent Study of the National University Continuing*

Education Association[25] That organization has developed 34 guidelines for conducting and improving independent study programs. The standards are summarized below:

- Do program practices reflect open access by students? Do program practices reflect professional competence by program authorities?
- Are the mission and policies clearly and publicly stated? Does the actual operation implement these documents?
- Is there a program administrator who is given authority for financial planning and responsibility for maintaining academic standards?
- Are the size and expertise of the staff adequate for the unit's functions? Are professional development opportunities available to the staff?
- Have the instructors demonstrated expertise in their subjects and met the same criteria as other faculty members in the institution?
- Does instruction reflect course objectives, student needs, and quality standards? Are assignments promptly returned with appropriate comments? Are examinations secure?
- Is there adequate provision for support services (including textbooks, library, counseling, testing, and transcripts)? Are bulletins truthful and clear, and do they include a refund policy?
- Are there research and evaluation activities that seek to improve the program, and are student evaluations used?

Regional accrediting agencies publish standards that apply to distance education activities. The Southern Association of Colleges and Schools (SACS) has been particularly active in setting mandatory standards for university-based programs. The National Home Study Council (NHSC) has provided abundant detail in its standards for proprietary and governmental programs. Universities and others not associated with NHSC can benefit from these standards, just as proprietary and military organizations benefit from university standards.

The National University Continuing Education Association (NUCEA), which is not an accrediting agency but an organization of institutions, presents voluntary guidelines for postsecondary institutions in many of its publications. All standards will change over time, so call one of the following sources for valuable, up-to-date information that you can apply to your program. Phones: SACS in Atlanta, 1-800-248-7701; NHSC in Washington, 202-234-5100; NUCEA in Washington, 202-659-3130.

Chapter 4
Managing Distance Education Activities

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■ *How is management in DE different from that in business or conventional education?*

A recent article in a professional journal concluded that "of all the areas of study in the field of distance education, the field of management appears most neglected."[26] Even so, we are not without some guidance. The principles of management that we apply in distance education are usually drawn from business. Business principles serve us well, provided we remember that the institutional context of a typical business differs from that of a typical distance education organization. The managerial techniques may be the same, but the goals and values against which results are judged are not.

It is useful to distinguish between the long-term and the near-term concerns of management. The leader in any organization is expected to have a vision of the future and to devote at least some effort toward communicating and achieving that vision. Other professionals in the organization may contribute to setting long-term goals and plans, but envisioning the organization's future and guiding it toward that end is a fundamental responsibility that cannot be delegated. If the leader does not accept or does not understand that strategic responsibility, the organization simply drifts.

At Athabasca University, Canada's university devoted wholly to distance education, dean of faculties Stephen Murgatroyd and management professor Andrew Woudstra examined long-term management issues. They identified several needs related to the practice of strategic management in DE institutions:

- The need for "mission-making" and pathfinding
- The need to build a sense of culture in the organization
- The need for commitment to the organization's mission
- The need for measurement, benchmarks, and evaluation as part of the concern for quality
- The need to regard the organization as designed for service
- The need to recognize the competitive environment in which DE operates

- The need to recognize and respond to "discontinuity"—abrupt change and unexpected opportunities—that interrupts the management of continuous processes.

The near-term concerns of good management are more easily shared and assigned. Making decisions, allocating resources, supervising faculty and staff, and maintaining financial control are near-term concerns in any organization. Models and principles derived from business are central in understanding and fulfilling these responsibilities.

Some near-term concerns, though comparable to those in business, are more pervasively felt in the typical DE organization because a comparatively small staff is entirely responsible for them. For example, every professional is responsible for assuring quality and service—so much so that one would be well advised to focus on these areas in starting any new position.

In a study of near-term management activities, researchers concluded that distance education systems require tighter management than do conventional educational institutions.[27] Each of four major facets of management—planning, organizing, leading, and evaluating—was seen to require greater flexibility and closer control than in a conventional institution. Economic issues require particularly close handling in a DE institution, the researchers found.

What Do You Manage When You Manage Distance Education?

The easy answer to this question is that you manage "the 3 M's"—*manpower*, *money*, and *material resources*. But successful DE administrators must also be aware of *mission*, which is to say there is an overarching purpose that influences plans and focuses routine activities. Only a step behind a sense of mission is a commitment to *quality*. These five concerns are the focus of much of this book.

It is important that the concerns of management are not interpreted as being those of top management alone. Certainly there are differences in the breadth and depth of responsibility that reflect themselves in the thoughts and actions of the chief executive officer and the staff members. Similarly, there are understandable differences in concern among professional staff members. The point is that the similarities are far more significant than the differences in a smoothly operating organization. Every major concern of management can and should be shared in an intellectually honest way with every professional in the organization if goal achievement and personal satisfaction are valued.

Dr. Mary Pankowski, who heads the Center for Professional Develop-

ment at Florida State University, puts it this way: "Every person must think of himself or herself as conveying the mission, the vision, and the quality assurance of the organization." Professional development of the staff clearly is involved here. In a field where comparatively little is "business as usual," competence is the best preparation.

Profile: Letter to the New Director

Dear Ann:

Congratulations on your appointment as director! Having been in the business for several years, I assure you it will be an enjoyable challenge—and a great opportunity to see your ideas and values reflected in a major program. You asked me for tips on running an effective program. I gave that some thought, and here is the best I can offer....

Your boss and the people you supervise already have granted you a "honeymoon" period. It will last a month or two, maybe a little longer, but in any case not six months. It will never be easier to make changes. This is your chance to improve methods and eliminate unrewarding effort and to begin new thrusts you think are important. Everyone will want to go along with you, though some may need help in adjusting to change. You will be allowed a few mistakes if, by the end of the honeymoon, there is a shared sense of progress and a positive view of the future.

Now is the time to set goals. The goals I adopted at the start fell into three broad areas—quality, service, and financial self-sufficiency. These areas have continued as our focus over the past several years. It has been useful for all of us, during turbulence, to follow guidelines set in calmer days. I recommend it highly.

Insist on professional standards; if a compromise is required to get a job done, reexamine the job. Strongly and publicly support the people who do the work and who meet your standards in the process, and quietly redirect the others.

Avoid getting too involved in the minutiae of other people's responsibilities. In addition to taking care of current business, you have the primary responsibility for looking ahead. Particularly when it comes to financial planning and goal setting, the easiest way to lose perspective is to focus needlessly on details.

In the context of specific problems, I'm sure I could offer other advice. But I think the general principles here will serve you well as you begin.

Sincerely,

Hal

Who Pays For Distance Education?

All the bills must be paid—it is a matter of who and how, not whether. Sources of income in DE include registration charges and fees, contracts and grants, appropriations, gifts, and profits on direct sales of products and services. Some of these sources of funding are by their nature stable and relatively fixed, others vary with registrations, and some are highly variable and unrelated to registrations. In DE programs whose registrations vary greatly from time to time, sources of funding must also be capable of varying. Senior management can create catastrophic conflicts in an organization when growth is encouraged but income is kept relatively fixed.

People are always the most costly element in the budget, though some professionals in DE seem unaware of the cost. For example, in government and the military, and sometimes in large businesses, there are so many people that they are regarded as a free resource. The size of the institution can obscure the view of its working parts—particularly the mechanisms that others use for raising funds and for paying people.

An inexperienced staff member may assume that not only individual time is free, but also that all resources are free. Thus a coordinator had large and beautiful brochures designed, printed, and mailed—only to discover that the brochures were so costly and the direct mail was so expensive that they more than absorbed all possible income from the program. In another instance, art work for a new course catalog was approved without considering the cost. As a result, the four-color publication exhausted the department's printing budget.

All institutions find it easier to spend than to acquire funds. To retain control, managers must keep expenses and income in balance. This is always done at the organizational level, considering all programs, and it is usually done at the individual program or course level, considering each project. Many organizations have developed their own financial forms and categories and require their use. Even if your organization does not specify a method of tracking costs by project, the person most immediately responsible for that project should do so.

If management and the professional staff were guided by budgets and bookkeeping alone, they certainly would be dull and unimaginative people to work with. The object of budget-watching is not to become a fiscal automaton; it is to support professional values and creativity by wisely allocating available resources.

How Many Enrollments Are Enough?

The economics of self-sufficiency is well worth studying. Distance education programs are predominantly or entirely self-sufficient. This

requirement has led to some rules of thumb on program offerings; for example, 20 (or 25) persons must pre-enroll to "make" an off-campus course offering. Fewer, and it cancels; more, and it is considered a victory for self-sufficiency.

It does not take much analytical thought before one decides to look for a better tool. Such a tool is the break-even point, which is the point at which revenues and costs are equal. Anything above that point is profit, and anything below it is loss. Follow these steps to determine your own break-even point:

1. ***Identify your fixed costs.*** These are the costs of opening the store, in a sense, and they are easily envisioned if you think of those costs that would go on independently of the number of course registrations. (Technically, a fixed cost is any cost that is independent of your product's volume. So if your mission accomplishment is measured in terms other than students registered—educational publications or video productions, for example—substitute that for references to students.) Salaries and building costs are examples of fixed costs. Avoid thinking of qualitative outcomes, such as service to the community, as your product; the profit on operations in a social service is not measured in dollars.

2. ***Identify your variable costs.*** These are the costs that vary directly with your product, such as the cost of materials, postage in independent study, and connect time if using computers to instruct. If instructors are paid per student registered or per lesson graded, then these are variable costs; if they are paid regular salaries, then salary is a fixed cost.

3. ***Compute your income per enrollment.*** For example, a distance education program might charge $150 for registration and an additional $40 per enrollment in income-generating textbooks. Whatever your own case, be careful to count all forms of income.

4. ***Analyze the effect of costs.*** At this point, you should construct a data table, or spreadsheet. A paper and pencil will do the job, but this also is an ideal application of a computer spreadsheet, such as Lotus 1-2-3. You now have generated enough data to ask some "what if" questions—for example, "What if we tacked on a service fee to increase income per registration?" "What if" questions will help you explore the financial implications of decisions before making them.

Before going on to step 5, organize the data you have collected, as shown in Table 2. We will assume that you will have 500 enrollments in this example. Obviously, you can work in any degree of detail and use any

Table 2. Absorption of Costs

	Elements	Totals
Anticipated registrations		500
Income to offset costs		
a. Income per registration	$130	
b. Less variable costs	$80	
c. Profit margin (a minus b)		$50
Profit (or loss) contribution		
d. Cost contribution (500 registrations times c)	$25,000	
e. Fixed costs	$22,000	
f. Surplus (d minus e)		$3,000
Profit (or loss) as % of income		
g. Total income (500 times a)	$65,000	
h. Profit (or loss) (f divided by g)		4.6%

Table 3. Break-Even Point

Calculations		
i. Fixed costs (e)	$22,000	
j. Profit margin (c)	$50	
k. Average fixed cost (e divided by 500)	$44	
l. Break-even point (e divided by c)		440 registrations

enrollment assumption you wish, but it is better to start out with a broad brush and refine the picture later.

You do not need to account for every cent earned or spent, but these figures should represent a very believable approximation of reality. Although salaries are usually the greatest factor in fixed costs, equipment, supplies, and marketing also add up rapidly. If you have other forms of income such as a grant, or if you wish to show details of fixed and variable costs, simply expand the spreadsheet.

5. ***Compute the break-even point.*** Using your estimate of registrations and the data in your spreadsheet, you can now calculate the point at which income and expense will be exactly balanced. The computation is presented in Table 3.

6. ***Show the break-even point graphically (optional).*** With this information, you can graph your situation by replacing the assumption on enrollments and recalculating the break-even point (Figure 1). To construct a

graph for the example in Tables 2 and 3, simply repeat the computations, using another assumption on registrations. To do so, first construct a graph that shows registration figures along the horizontal axis of the graph and cost and income figures on the vertical axis.

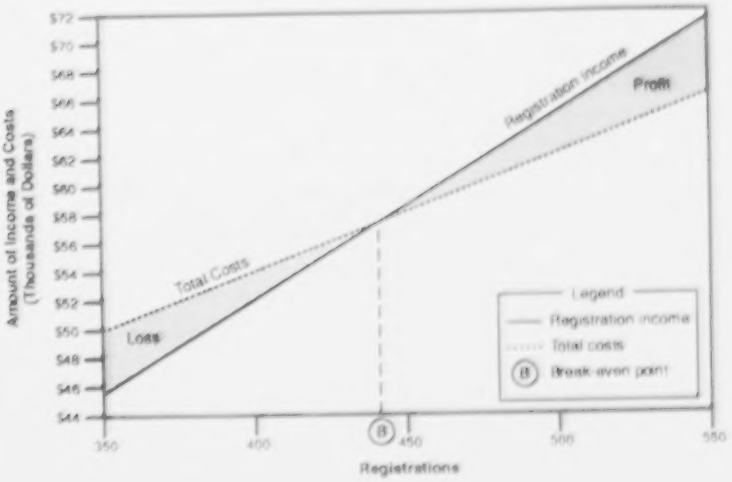
In Figure 1, we entered points representing enrollment income from 400 students ($130 x 400 = $52,000) and income from 500 students ($130 x 500 = $65,000). We then drew a line connecting and extending these two points. We labeled that line "registration income." Next, we calculated the variable costs for 400 students (400 x $80 = $32,000) and for 500 students (500 x $80 = $40,000). We then added these figures to the fixed costs to obtain total costs ($32,000 variable + $22,000 fixed = $54,000 for 400 registrations; $40,000 variable + $22,000 fixed = $62,000 for 500 registrations).

We then plotted the two total cost points and connected them with a line labeled "total costs." The *break-even point* is at the intersection of the *registration income line* and the *total costs line*. The area above the break-even point is profit, and the area below it is loss.

How Can You use the Break-Even Point to Make Decisions?

Knowing your break-even point permits you to ask some "what if" questions. If you need more detail on calculating the break-even point, a

Figure 1. Break-Even Analysis



good case study of distance education management in Canada is available.[28] Or you may refer to an award-winning article on computing the break-even in an American independent study program.[29] Even without additional study, the guidelines above should equip you to deal with the three practical situations described below.

Income-raising scenario:

In anticipation of new equipment costs, we need to bring more money into the department. We decide to do so by attracting more enrollments to this program.

Like every decision, this one has its cost. In discussion we conclude that a part-time instructor will have to be transferred to this program, and we will have to increase marketing significantly. Fixed costs will go up. To envision this on the graph in Figure 1, raise the total cost line. Although the original intention was to increase our income, the immediate effect of this decision was to decrease the surplus! The break-even point is now higher than before. An alternative would be to purchase a few off-the-shelf courses from other institutions rather than develop all of our own. This would generate new enrollments more quickly and would also reduce the fixed costs of development.

Inflation scenario:

Cost-of-living increases for the staff have increased our fixed costs, and inflation has increased our variable costs. Where will the money come from?

After considering various proposals for increasing student registration fees, it seems probable that any increase will result in a slight decrease in enrollments. How much more fee income do we need to cover the new fixed and variable costs, allowing for lost registration? Break-even analysis has the answer. This can be envisioned by raising the lines on the graph for total costs (to reflect inflation) and for income from registrations (to reflect new fees). An alternative proposal is to let a recent position vacancy go unfilled. By lowering the fixed costs, do you see the effect on the break-even point?

Budget-cut scenario:

Unlike proprietary institutions, in which income will always increase with registrations, it is not unusual for public institutions to operate on a fixed budget, with all collected fees reverting to the government. In this scenario, assume that a state budget cut results in a maximum budget of $60,000 for the program. To envision this, draw a horizontal line on the graph at $60,000.

Our fixed costs will remain the same under all conditions, so to stay within the restriction we will have to control some variable costs. We

conclude that this would be most easily done by placing an "enrollment cap" on the program. Dropping a line down from the intersection of $60,000 and the "total costs" line suggests a cap of about 475 enrollments. If the budget cut set a budget so low that it absolutely precluded breaking even (for example, $50,000), we would consider whether to continue the program.

In applying break-even analysis, keep in mind that this is a model of the administrative process. Like any model, it can be pushed beyond rational use. Some limitations of break-even analysis are that it does not include the economies that any good manager will implement from time to time or the unanticipated costs that will occur, and it is easier to apply to an entire program than to an individual course. On the other hand, it is a good aid to rational decision making, and it can definitely tell you how many enrollments are enough.

What Should Be Done to Market Distance Education?

In a well-staffed distance education organization, professionals may handle all aspects of marketing from concept to implementation. This section of the handbook provides guidelines for those in smaller organizations that must handle their own marketing. Professional techniques and staffing and large marketing budgets are not yet the norm in American distance education.

Follow these guidelines:

- ***Prepare an annual marketing plan***. Try this outline for a start, modifying it as appropriate: (a) marketing objectives; (b) brief analysis of the client groups served—who they are, where they are, what they need; (c) intended marketing activities—planned brochures, direct mail, paid advertising, press releases, etc.; and (d) budget. A useful addition to your plan is a chronological listing of intended activities. This will help you avoid being inundated by marketing activities that occur all at once.
- ***Review the plan at least monthly***, or in conjunction with each DE project. Follow the plan, or change it as necessary, but do not abandon it with the thought that you will someday prepare a better one.
- ***Coordinate responsibility***. Share responsibilities for various aspects of marketing within an organization. That implies operating as a team. If some centralized public information or marketing services are available, however limited, work actively with that office, rather than simply assigning tasks.
- ***Trace and evaluate results***. At a minimum, your mailings or ads should have something embedded in them that will allow you to

determine their results. Use this information to improve your efforts. Examples: Refocus mailing lists used, align brochure costs with value received, eliminate unproductive activities.

Marketing should not become a rote activity. Thinking and rethinking what is being done, thus assuring that the marketing is appropriate to the goal, should be the only routine aspect.

In carrying out your marketing plan, do not overlook the inexpensive options. For instance, in a Florida DE activity an annual press release to the state's newspapers saying that "a new free brochure is available" can be counted on to draw hundreds of responses. And Louisiana State University's independent study program attributed its significant growth in enrollments to a series of public service announcements played during statewide broadcasts of football games.

Those in accredited institutions do not have complete freedom in marketing. Accrediting agency policies and institutional policies alike may provide content guidelines to assure integrity and accuracy in advertising, catalog production, and so forth. Typical guidelines call for having information on file to substantiate references to career opportunities as a result of course completion, assuring complete statements of program costs, and not implying that accreditation was granted to a specific course or program within an institution. For more than twenty years the National Home Study Council has refused to accredit institutions that have third-party sales arrangements or independent sales representatives. Some of the marketing standards applied in business, which might regard a franchise opportunity as interesting or an advertising overstatement as mere hyperbole, are unacceptable in accredited distance education programs.

How Do You Build In Quality?

Quality can be vastly enhanced or completely undermined by management. A standard story for sports reporters at the beginning or the end of any season is to analyze the win-loss record of the nation's outstanding coaches. A great coach can strongly influence a situation by making the most of the resources available and overcoming obstacles that would defeat lesser individuals. The analogy to the effects of focused management in other endeavors is obvious, even when the win-lose aspect is not nearly as well defined.

There are about 80 independent study institutions in the National University Continuing Education Association. Each year NUCEA's Division of Independent Study conducts a careful evaluation of course study guides submitted to a committee of authorities in the field. Ten or fifteen guides are then selected for national awards for excellence in course design.

Knowing nothing more, one might assume that each of the 80 institutions could expect to win an award every five to seven years.

That is not the case, of course. Well over half of the institutions have never won an award. And of the others, just a few have dominated the award process—Indiana University, the universities of Florida, Nebraska, and Missouri, Pennsylvania State University, and Brigham Young University. Discounting a conspiracy, some institutions clearly "play the game" of assuring course quality with greater proficiency than others.

One explanation frequently offered is that smaller schools are at a competitive disadvantage. They have fewer courses, leaner finances, and little or no professional support in course preparation. But that position falls apart when one considers that smaller independent study programs have won awards in the recent past—Auburn, the University of Alaska, Western Michigan University, and, several times, the University of Kansas.

Behind NUCEA's national awards program is the concept that public recognition of quality will encourage continuing efforts in that direction at all institutions, large and small. That process is working, but not equally everywhere. What distinguishes award-winning schools from the others is this: Where quality is an everyday concern, the effect of producing award-quality courses is felt throughout the curriculum.

Profile: Quality Emphasis in Distance Education

At the University of Florida, every staff meeting in the Independent Study Department begins with a review of a recently published or recently revised course. Each person attending has previously rated the course, using a rating sheet that is in national use. The focus of the meeting is to confirm that quality assurance procedures are working as intended. If a need for improvement is noted, discussion centers on what must be done to improve future courses. It is a simple process, taking about twenty minutes of individual preparation time and ten minutes of staff meeting time.

The resulting awareness of generally accepted standards and improvement in courses has been dramatic. In the past eight years, the department has gone from never having won any awards for course excellence to its current position as a national leader in that area.

Staff sensitivity to standards of quality is only one factor in a range of quality considerations—but at Florida it is seen as being the key variable. Every other action taken has flowed from this basic agreement on values and the need to reflect them in practice.

In a quality-conscious independent study program, some submitted course manuscripts may be rejected, and all are returned to their authors at some point with requests for changes that will improve course quality. At the opposite extreme, a quality-unconscious institution may accept almost anything submitted as a correspondence course, perhaps mere reading lists with text questions to be answered. Some manuscripts may go directly to the copying machine "as is," without any observable evidence of quality control. Clearly, quality awareness implies active professional participation. The more passive, laissez-faire approach can limit the distance education department's efforts to little more than clerical support.

The only approach that is more destructive of quality than doing nothing is that of sacrificing quality each time a conflict arises between quality and anything else. Perceptions of inadequate staffing, reaction to reduced funding, the perceived lack of time, or the absence of will to support standards when political or interpersonal pressures make it expedient to overlook them carry within them the power to block progress or to destroy achievement. The enemy is passivity when positive acts are called for.

These steps will help you build quality in your program:

- ***Plan***. Identify your quality goals and the steps within your authority that will lead to achieving those goals. Decide how you will measure your progress. Enlist the cooperation of others.
- ***Assign responsibility***. Someone must be assigned the responsibility and given the authority to pursue each element of quality assurance. Everyone's responsibility is no one's responsibility.
- ***Disseminate***. Communicate quality guidelines to staff and faculty in writing. Stress the guidelines in orientations or in initial discussions on projects. Here are some other ways to keep your guidelines out front: Cite them in standard office procedures, discuss them in handbooks for faculty and staff, build them into contracts, and share progress reports on quality goal achievement. If you control the agenda, include one quality issue in each staff meeting and encourage discussion.
- ***Evaluate***. Measure your progress toward your goals. Set up a checklist and evaluate the elements of quality in your program. For example, evaluate new courses, evaluate new and existing materials, evaluate promptness and quality of service, produce monthly or quarterly progress reports. Evaluate in a group meeting and discuss steps to be taken. Encourage wide participation in evaluation; it builds commitment to standards.

- ***Reject.*** Turn down products or insist on reworking projects that do not meet quality standards. This is one of the hardest steps, but fortunately it is rarely needed. It is the "bottom line" in quality control. A lack of will here can erode your entire program.

Quality must be stimulated and rewarded if the initial thrust is to be maintained. No one person can assure quality; it takes willing cooperation. And that takes leadership.

How Do You Assure Effective Support?

Communication is the key to effective support. Nothing will guarantee the support of your distance education program, and if political or economic reverses occur, supporters could be hard to find. But without effective communication with your colleagues and clients, your academic tower rests on sand.

Garnering support through effective communication is not always easy. You may have to convey facts to someone who is uninterested, poorly informed, hostile, or remote. In such circumstances, it is tempting to abandon the communication effort and to focus on more rewarding endeavors, but that may be a short-term solution to a longer term problem. More than one channel of communication is always available for any message. If the first attempt fails, try something else. On the formal side, you can use periodic structured reports, memoranda, committee work, staff meetings, special topic meetings, and shared minutes of meetings. On the informal side, you can use phone calls, brief office meetings, handwritten notes, and conversation over coffee or in passing. There are no rules, so use anything that works.

Each professional staff member must feel that he or she is influencing significant decisions. Clients must feel that they are being kept informed and are being heard. Some other ventures may continue to grow in a closed environment, but distance education grows best when nourished by communication and cooperation at all levels.

How Can Leadership Make a Difference?

Leadership is a responsibility of every professional position. Although most dramatically visible in the top position in an administrative hierarchy, it is leadership in the broader sense that concerns us most from day to day. Every professional in distance education practices leadership in accepting responsibility for some segment of the mission, then working toward its most effective accomplishment through the use of human resources. Thus the staff member without subordinates must also be a leader, as must the

technical specialist. The goals of the organization are the end; leadership is one of the means.

The popular image of the leader may be one of visceral leadership—the heroic leader of the military charge or the unalterably determined leader who persists in the fight for justice. In reality, cerebral leadership comes first. The most effective leadership is often quiet and undramatic. Leadership occurs in organizations composed of individuals who have distinctive roles. Thus leadership is expressed in various ways by people in the organization.

Although volumes have been written on leadership, an infrequently discussed area in the literature of distance education is the leader's responsibility for ethical conduct. It is an important concern, which is worthy of some elaboration here.

Ethical standards are socially determined. Individuals in an organization are often influenced in their ethical decisions by their perception of what is expected of them. Usually, the demonstrated standard rather than the published guideline sets the pace. These are some of the ethical issues confronting the distance educator:

- Pressures in an entrepreneurial environment can encourage some people to compromise academic integrity to gain some competitive advantage. At its worst, under-the-table payments for the political favors of a public official have been "laundered" as payment for some service to continuing education. At a less dramatic level, academic standards have been compromised to retain the favor of a powerful individual.
- Opportunities to replace the traditional functions of the faculty with faster and less costly technology can transfer much of the responsibility for academic quality to administrators. Students may be led to believe that their courses are current and their professional preparation is adequate, when in fact no one closely associated with the course is prepared to make those judgments.
- Concerns about increasing enrollments or increasing income may lead to peddling academic credit. Much less may be required of the distance student than one in a traditional academic environment, for equivalent credit. A variation on this theme is to lend the name of an accredited institution to academic subcontractors, although they are in no other way associated with the institution.
- Pressures to project an innovative image or to attract outside funding may result in programs being offered, and widely publicized, al-

though they have little inherent merit and no likelihood of long-term success. Intentionally misrepresenting the instructional value of the media used is also an ethical issue.

Some have argued that there is a difference between personal ethics and business ethics. This would lead one to conclude that the officers of a corporation are employed by stockholders to make a profit, not to pursue social policy, except that which is written into the law. In distance education, this thought would encourage pursuing the immediate advantage rather than the broader value in the ethical conflicts posed above. Little support has come for this approach in recent years, with situations as diverse as covert arms deals and massive oil spills leading to the same conclusion: Responsibility for an endeavor includes an obligation for ethical conduct that goes beyond the narrow interpretation of assigned duties.

When ethical choices are made, the interests of the individual, the profession of education, and society as a whole must be considered. Whatever one's role in an organization, the obligation for ethical behavior is an extension of ordinary morality, not a special ethic that applies to businesslike activities. An aspect of distance education leadership, then, is ethical leadership. And an aspect of being a professional member of an organization is personal responsibility for ethical behavior, regardless of perceived pressures to behave otherwise. The ultimate test comes when one is faced with the dilemma of going along with unethical behavior or getting out of the organization. The first solution is to attempt to influence the organization's practice, and if that fails, to make a choice.

Chapter 5
Opportunities for Professional Development

Chapter 1
What Is Distance Education?

Chapter 2
The Mission of Distance Education

Chapter 3
Effective Methods for Distance Education

Chapter 4
Managing Distance Education Activities

Chapter 5
Opportunities for Professional Development

■ *What are the opportunities for professional development in distance education?*

One of distance education's strengths is its ability to integrate diverse skills and professional backgrounds. Among leaders in the field, there is absolutely no agreement on the professional preparation that is most relevant to entering the field. Postgraduate work in adult education has been cited by some as a valued background, but just as frequently shared values and experiences have been seen as most rewarding professionally. Most administrators and staff members have drawn on experience and education in other fields before entering distance education.

This diversity does not mean, however, that DE practitioners have nothing in common. Once they have entered the field, they strongly share the belief that a career-long series of professional development activities should be arranged.[10] Other shared values are that the career development of DE staff is a responsibility of senior management and that each individual should recognize and take advantage of development opportunities as they occur.

An analysis of career patterns suggests that one moves through a series of stages:[11]

- *Apprentice*, helping and learning from mentors
- *Colleague*, making independent contributions
- *Mentor*, assuming responsibility for others
- *Sponsor*, exercising power and providing direction for the organization

Although career development might cease at any stage, the most highly valued contributions come from those who succeed in entering each stage. That analysis provides a framework for selecting situationally appropriate career development activities and for describing changing role relationships.

For a member of a small DE staff, opportunity often comes through attending national conferences, professional association meetings, and similar external activities. For a larger staff, the opportunity also may include internal activities such as in-service meetings, committee work, and

sponsored study. Professional staff members should regularly review books and periodicals in the field and participate when a career-developing occasion arises.

Top management must assure the availability of opportunities, although it is not management's responsibility to force development upon an individual. It is reasonable for the staff to expect that mentors and sponsors will provide journal subscriptions, encourage conference attendance, and provide focused career development.

How Can You Stay Current in the Field?

Building on the points made above, you must take advantage of the opportunities you have, and you must create new opportunities. Reading this book is a commendable start, but there is more.

The easiest step is to regularly read at least one professional journal in the field of distance education. A task of apprenticeship, reading should continue throughout one's professional life. Even the smallest departmental libraries can afford subscriptions to one or two DE journals, and a personal subscription is not very expensive. There are several journals to choose from:

- *Distance Education* is an excellent general journal, as measured by quantity, quality, and diversity of coverage. It may strike some Americans as odd to subscribe to an Australian journal, but keep in mind that DE is very much an international field. Published twice a year. Write to Darling Downs Institute Press, Toowoomba, Queensland 4350, Australia.
- *The American Journal of Distance Education* began publishing in 1987, but in these few years it has established itself as a reliable sourcebook of current thought in the field. Published quarterly. Write to College of Education, Pennsylvania State University, University Park, PA 16802.
- *The Journal of Distance Education* is an international journal published by the Canadian Association of Distance Education. Its articles reflect its commitment to scholarly study and to innovation in the field. Published twice annually. Write to CADE Secretariat, 151 Slater Street, Ottawa, Ontario, K1P 5N2 Canada.

Researchers and graduate students will also want to keep up with *Research in Distance Education*, the newest journal in DE. It is an informal forum for presenting research in progress, as well as research results. Published quarterly by the Centre for Distance Education, in Canada. Write to the Centre at Athabasca University, Box 10,000, Athabasca, Alberta, T0G 2R0 Canada.

If you are in an accredited proprietary home study school, you will want to keep up with the *National Home Study Council News*. This quarterly publication carries information on institutions, educators, and professional standards. Write to NHSC, 1601 18th Street NW, Washington, DC 20009.

Depending on one's special interests, other journals that frequently carry DE articles include *Lifelong Learning*, *Adult Education*, and *Educational Technology*.

A small professional library should be available to, and used by, the staff of every distance education activity. The nucleus of such a library is suggested in the recommended references at the end of this chapter.

Somewhere in the apprenticeship phase and certainly as a part of earning the title of professional colleague, one should attend and participate in professional association meetings. Many one-time seminars and conferences are conducted each year, and several groups associated with DE hold annual conventions. Some of the most highly regarded of these are the University of Wisconsin's Annual Conference on Teaching at a Distance; in various countries, conferences of the International Council for Distance Education; the annual meeting and the regional meetings of the National University Continuing Education Association; the annual conference of the American Association for Adult and Continuing Education; the annual Correspondence Education Workshop of the National Home Study Council; and the meetings of the National University Teleconference Network. Notice of forthcoming meetings is carried in *The Chronicle of Higher Education*, among other places.

One of the strongest contributions to professional development, both your own and that of others, is to publish in journals and to present at conferences. No money is paid for submitted articles, but the requirement to organize and present one's thinking and the opportunity for professional recognition offer rewards in themselves.

What Are the Benefits of Joining Professional Organizations?

Distance education staff members, often in small organizations or carrying uncommon responsibilities, need stimulating contact with others who share their professional interests. For many, the best means of meeting this need is through membership in a professional organization.

Before joining, you may find it difficult to envision the advantages of membership; the expense may be seen to outweigh the benefit. After joining, many people find a professional "home" in their association and come to identify quite strongly with it. These are the central benefits:

- ***Professional currency***. Nearly every organization distributes a newsletter, a journal, and other publications to its members. Even if some of the same publications are available through your office, personal copies arrive promptly and you can keep them for reference. Usually these publications carry news of upcoming meetings and recent books. Although publishing in a professional journal is never restricted to association members, many have found that being identified with a professional association has encouraged them to write for publication.

- ***Professional networking***. Interacting with others who share your professional interests and being exposed to a stimulating variety of ideas and experiences are major advantages of any association. Most professional associations form special interest groups and specialized divisions, and many have regional, state, or local meetings. All have national meetings for the association as a whole, and some hold meetings focused on topics of continuing concern. Some associations incorporate a variety of committees in their structure, thus presenting opportunities for depth in interaction, as well as the chance to influence the field. The professional bonds formed outside the meeting rooms are as vital as the information conveyed in conference sessions.

- ***Professional recognition***. Most associations have systems for reviewing and recognizing achievement. Program innovations and successes, personal contributions to the field through service or publication, and excellence in program design are often recognized by professional associations. Frequently, this regional or national recognition leads to recognition within one's own institution.

How Do You Locate Specialized Information?

The bibliographies and recommended references that follow will guide you to some productive sources if you are searching for specific information in the literature. These sections will also suggest a few references that should be considered for purchase by individuals and by institutional libraries. If DE publications are not available through your professional library, now is the time to start such a collection or to suggest one.

Bibliographies

Several good reviews of the literature of distance education—each roughly the size of this handbook—are available. An ERIC review, *Distance Education: An Information Age Approach to Adult Education*, focuses on telecommunications and expands on many of the topics touched in this handbook.[32] It describes the effect of new technologies, discusses

definitions and theory, reviews quality concerns, and summarizes research. The ERIC system itself may be viewed as a massive bibliography that is constantly updated, and it goes vastly beyond the function of bibliography in providing complete documents and reports.

One of the best sources is Holmberg's *Status and Trends of Distance Education*, which is listed below. It incorporates a comprehensive bibliography, uniquely organized by topics of broad interest.

Recommended references

This brief reference list cites publications that will provide further depth and detail on topics treated in this handbook.

Council on the Continuing Education Unit. 1984. *Principles of good practice in continuing education*. Silver Springs, Md.: The Council. Prepared by a committee of continuing educators in a three-year project headed by G. J. Andrews of North Carolina State University. The publication addresses five areas of concern: learning needs, learning outcomes, learning experiences, the assessment of learning outcomes, and administration. Although the focus is on noncredit programs, the principles are generalized to all continuing education activities.

Daniel, J. S., Stroud, M. A., and Thompson, J. R., eds. 1982. *Learning at a distance: A world perspective*. Edmonton, Alberta: Athabasca University. Papers collected with the goal of describing "the state of the art of distance education in the early 1980's." Prepared under the sponsorship of the International Council for Distance Education, the publication contains sections on international trends and applications, recent research, support services, management, and alternative media.

Division of Independent Study, National University Continuing Education Association. 1989. *Standards of the Division of Independent Study*. Washington, D.C.: NUCEA. Presents guidelines for conducting and improving the quality of programs in independent study. These standards, revised several times, have provided agreed-upon goals for university-based programs since 1962. They cover philosophy, mission, administration, staffing, instruction, services, and research.

Feasley, C. E. 1983. *Serving learners at a distance: A guide to program practices* (Report No. 5). Washington, D.C.: ASHE-ERIC Higher Education. A review and analysis of more than 140 publications concerning distance education. Five basic areas are covered: student participation, faculty issues, technology of delivery, support systems, and the organization and process of distance education. Available as ERIC microfiche ED 238 350.

Garrison, D. R. 1989. *Understanding distance education.* New York: Routledge. Discusses differences between traditional education and distance education, focusing on the essential need for two-way communication between teacher and student. Unlike this Staff Handbook, the book depicts DE as a method of instruction similar to classroom teaching in all ways but physical separation.

Holmberg, B. 1985. *Status and trends of distance education.* Lund, Sweden: Lector Publishing. Summarizes the literature and research on learning at a distance. This is the most comprehensive scholarly work on the subject. American sources are cited, as are significant research reports and literature from throughout the world. The bibliography includes hundreds of titles.

Keegan, D. 1990. *The foundations of distance education.* 2d ed. New York: Routledge. Well-documented report of the author's observations following research visits to distance teaching institutions on four continents. The author reviews the concept and its distinctions from conventional education and discusses the theory, practice, and evaluation of distance education.

MacKenzie, O., and Christensen, E. L., eds. 1971. *The changing world of correspondence study.* University Park, Pa.: Pennsylvania State University. An anthology of significant literature on the topic, spanning the past one hundred years. You do not have to be involved in correspondence work to benefit from this review of the roots of distance education.

Matkin, G. W. 1985. *Effective budgeting in continuing education.* San Francisco: Jossey-Bass. Practical techniques of budgeting and financial control for courses and for organizations. Includes extensive advice on break-even analysis. As appropriate for those new to financial controls or in small programs as it is for budgeting professionals in larger organizations.

Merriam, S. B., and Cunningham, P. M., eds. 1989. *Handbook of adult and continuing education.* San Francisco: Jossey-Bass. Produced by the American Association for Adult and Continuing Education as a practitioner's guide. Contains expanded treatment of many topics in this Staff Handbook, including the role of professional associations, distance education technologies, and the history of continuing education in America.

Mugridge, I., and Kaufman, D. 1986. *Distance education in Canada.* Dover, N.H.: Croom Helm. Key figures in university-level distance education in Canada describe current practices and innovations.

Stewart, D., Keegan, D., and Holmberg, B. 1983. *Distance education: International perspectives*. New York: St. Martin's Press. A collection of selected articles, some appearing in English for the first time, to provide an overview of new developments in the field. This book can be viewed as an update of MacKenzie and Christensen's *The changing world of correspondence study*.

Wedemeyer, C. A. 1981. *Learning at the back door: Reflections on nontraditional learning in the lifespan*. Madison: University of Wisconsin Press. A noted scholar and a successful DE administrator, Wedemeyer draws his observations from many years of experience. The book treats the rise of nontraditional learning and its implications, the place of technology, and the concept of a learning society. The title refers to a quotation from Swift (1704): "For to enter the Palace of Learning at the Great Gate, requires an expense of time and form; therefore men of much haste and little ceremony are content to get in by the back door."

Notes

1. To explore this point in greater depth, see D. Keegan, "A Theory of Distance Education: From Peters to Peters." In M. G. Moore, ed., *Contemporary Issues in Distance Education in North America* (Oxford, England: Pergamon Press, 1990). Also see D. Keegan, *The Foundations of Distance Education* (Dover, N.H.: Croom Helm, 1986).

Throughout this handbook, endnotes are used not so much for scholarly attribution as for sharing sources of further information.

2. Based on H. Markowitz, "Similarities and Differences: Military and Civilian Correspondence Programs," *National Home Study Council News* Fall, 1983, pp. 22-23.

3. V. V. Pittman, "The Persistence of Print: Correspondence Study and the New Media." In M. G. Moore and G. C. Clark, eds., *Readings in Principles of Distance Education* (University Park: Pennsylvania State University, 1989, pp. 37-42).

4. H. Markowitz, "The Next Twenty Years in American Independent Study," *Journal of Distance Education* 3(1), 1988, pp. 89-93.

5. Cited by D. Keegan, *The Foundations of Distance Education* (Dover, N.H.: Croom Helm, 1986, p. 183).

6. J. Magarrell, "Computerized Education: Time to Sink or Swim," *The Chronicle of Higher Education* XII, 9(1), 1976.

7. M. G. Moore, "Distance Learning in the United States: The Near Future," *Distance Education* 8(1), 1987, p. 42.

8. Data cited from NUCEA Division of Independent Study, Research and Evaluation Committee, *Independent Study Program Profiles: 1988-89* (Columbia: University of Missouri, 1990). This annual survey is a committee activity of the Division; the institution to publish it varies from year to year.

9. D. Keegan, *The Foundations of Distance Education* (Dover, N.H.: Croom Helm, 1986, chapters 1-7).

10. B. Holmberg, *Status and Trends of Distance Education* (Lund, Sweden: Lector Publishing, 1985). To order this excellent reference book, write to Lector Publishing, P.O. Box 14010, S-22014 Lund, Sweden.

11. J. A. Bååth, *Correspondence Education in the Light of a Number of Contemporary Teaching Models* (Malmö, Sweden: LiberHermods, 1979). To order, the publisher's address is Malmö, Sweden. The author considers the teaching models (theories) of Skinner, Rothkopf, Ausubel, Egan,

Bruner, Rogers, and Gagné to analyze what correspondence study is and how it could be improved through the application of psychological research and theory.

12. R. M. Gagné, *The Conditions of Learning* (New York: Holt, Rinehart and Winston, 1977).

13. C. N. Gunawardena, *New Communications Technologies and Distance Education*, 1988. Ph.D. Dissertation, University of Kansas. Winner of the Wedemeyer Award in 1989, from the Division of Independent Study of NUCEA.

14. M. Moore, "On a Theory of Independent Study." In D. Sewart, D. Keegan, and B. Holmberg, eds., *Distance Education: International Perspectives* (New York: St. Martin's Press, 1983, pp. 68-94). This book contains commentary on distance education theory by several leading scholars in the field, in addition to Moore.

15. M. Sammons and C. E. Kozoll, *Preparing an Effective Self-Study Course* (Urbana: University of Illinois, 1986).

16. W. Perry, *The Open University* (San Francisco: Jossey-Bass, 1977). All of chapter 5, Course Creation, will provide valuable background for anyone working with course teams.

17. M. J. Van Kekerix, *The SUN Experience*, 1986. Ph.D. dissertation, University of Nebraska, p. 410.

18. V. V. Pittman, "The Persistence of Print: Correspondence Study and the New Media." In M. G. Moore and G. C. Clark, eds., *Readings in Principles of Distance Education* (University Park: Pennsylvania State University, 1989, p. 41).

19. ERIC is a resource you ought to know about, but if you have not taken courses in the field of education you may not have run into it before. The acronym stands for Educational Resources Information Center. ERIC publishes the *Current Index to Journals in Education*—a treasure of current information, including an annotated index of articles in every journal relating to distance education. ERIC also distributes hard copy or inexpensive microfiche of reports and other documents. Every major university library's reference section has a complete ERIC collection, including microfiche files, and many corporate or community college libraries have partial collections.

20. L. Schamber, *Delivery Systems for Distance Education*, ERIC Digest, May 1988 (Syracuse, N.Y.: Syracuse University, 1988).

21. M. J. Van Kekerix, *The SUN Experience*, 1986. Ph.D. dissertation, University of Nebraska. Winner of the Wedemeyer Award in 1987, from the Division of Independent Study of NUCEA.

22. NUCEA, Committee on Liaison for Accrediting and Standards in Continuing Education, *Standards of Good Practice in Continuing Education: A Compilation of Resource Documents* (Washington, D.C.: NUCEA, 1985). A more comprehensive set of standards was being prepared by NUCEA when this Staff Handbook was published.

23. Council on the Continuing Education Unit, *Principles of Good Practice in Continuing Education* (Silver Springs, Md.: The Council, 1984).

24. National Task Force on the Continuing Education Unit, *The Continuing Education Unit: Criteria and Guidelines* (Washington, D.C.: National University Extension Association [now NUCEA], 1974).

25. National University Continuing Education Association, *Standards of the Division of Independent Study of the National University Continuing Education Association* (Washington, D.C.: NUCEA, 1989).

26. S. Murgatroyd and A. Woudstra, "Issues in the Management of Distance Education," *American Journal of Distance Education* 3(1), 1989, pp. 4-19.

27. B. L. Snowden and J. S. Daniel, "The Economics and Management of Small Post-Secondary Distance Education Systems," *Distance Education* 1(1), 1980, pp. 68-91. Reprinted in Stewart, Keegan, and Holmberg, eds., *Distance Education: International Perspectives* (New York: St. Martin's Press, 1983, pp. 398-424).

28. B. L. Snowden and J. S. Daniel, "The Economics and Management of Small Post-Secondary Distance Education Systems," *Distance Education* 1(1), 1980, pp. 68-91.

29. H. Markowitz, "Financial Decision Making—Calculating the Costs of Distance Education," *Distance Education* 8(2), 1987, pp. 147-161.

30. H. Markowitz, "Continuing Professional Development in Distance Education," *American Journal of Distance Education* 2(3), 1988, pp. 64-73.

31. G. W. Dalton, P. H. Thompson, and R. L. Price, "The Four Stages of Professional Careers: A New Look at Performance by Professionals." In R. Katz, ed., *Career Issues in Human Resource Management* (Englewood Cliffs, N.J.: Prentice-Hall, 1982).

32. J. Zigerell, *Distance Education: An Information Age Approach to Adult Education*. ERIC Clearinghouse on Adult, Career, and Vocational Education, Information Series No. 283 (Columbus: Ohio State University, 1984). To contact ERIC about this and other DE materials write: ERIC Clearinghouse, Ohio State University, 1960 Kenny Road, Columbus, OH 43210.